

The Custom Field Manager module is an engine that lets you add any number of data fields to new tabs to meet your specific requirements. Custom fields can be added to master tables or transaction header tables. These custom fields can be character, date, integer, logical or numeric in nature. Custom fields of any type can be assigned a default value while character-type custom fields can have a lookup which can be used to validate data and locate records. The ability to add custom fields to both standard AccountMate tables and non-AccountMate tables makes it possible to create the customizations your company needs without purchasing a source code license and modifying the source code. Custom fields are also seamlessly upgraded in future product releases.

## AccountMate 12 for SQL or Express Custom Field Manager Module

### Add Custom Fields to Master and Transaction Tables

You can add fields to maintenance records (e.g. customer, vendor, inventory and employee) and selected transaction records (e.g. accounts receivable invoice header table, accounts payable invoice header table, sales order header table, purchase order header table, work order header table and time card header table). This makes it easier to customize AccountMate to capture additional information that you may need without having to modify the source code.

Add the custom fields to the AccountMate data tables that support this feature. You can add character, date, integer, logical or numeric custom fields.

Field Name
trackingnumber

Field Name: trackingnumber  
Field Caption: Tracking #  
Data Type: char Length: 10 Decimal: 0  
Input Option: Alphanumeric  
Default Value:   
Allow Lookup:   
Lookup Type: TRACKING# Tracking #

Custom Field Definition

### Assign Custom Fields

You can specify whether the custom fields will be read-only or editable in the selected AccountMate screens. You can add multiple custom page tabs to the existing AccountMate screens. Select the custom page tab where the custom fields will appear and specify the order in which the custom fields will be displayed in each page tab.

### Create Records for Custom Field Lookup and Validation

Character-type custom fields can be assigned a lookup type. This lets you control and validate the values that can be assigned to custom fields. You can create an unlimited number of lookup types and assign them to the appropriate custom fields. The same lookup type can be assigned to multiple custom fields thereby reducing setup time and helping you maintain data consistency in the system. The values that are available for each lookup type can be created in advance or added on-the-fly when using the custom fields in various AccountMate screens.

### Company Access Lock

You can lock a company database to prevent others from accessing it or logging into it while you add or edit custom fields in AccountMate. Once locked, only the Supervisor or the user

who set the lock can lift it. Any users who were in the company at the time it was locked will have limited access so that they can continue to run only the functions that they have open. This allows them to complete whatever processes they have started while preventing them from initiating new ones. This feature can also be used to facilitate period-end closing, data transfer to GL, year-end closing, installation of product updates or any other processes that require exclusive access to the company database.

## Other Features

- Assign a default value to custom fields.
- Add custom fields to non-AccountMate tables.

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